USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 9/30/2004

GAIN Report Number: GM4035

Germany

Fishery Products

Annual

2004

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Report Highlights:
The total volume of fish and fishery products produced in Germany amounted to 439,637 MT in 2003, a drop of only 0.3 percent compared to 2002. Per capita consumption increased by 400 g to 14.4 kg, and is expected to further increase to 14.8 kg in 2004. Germany is the biggest net-importer of fish and fishery products in the EU. Best prospects for U.S. fish products are for Alaska-pollock, salmon, lobster and caviar substitutes.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

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Executive Summary

Germany is the fourth largest fish processor in the EU-15, after the U.K., France, and Spain. However, only 21 percent of the raw fish is sourced domestically.

Production value of fish and fishery products at factory level decreased by 3.1 percent to U.S.$ 1.889 billion (1.531 billion Euro) in CY 2003, while production volume decreased by only 0.3 percent compared to CY 2002 and amounted to 439,637 MT (product weight).

Calculated per capita consumption increased to 14.4 kg in CY 2003, from 14.0 kg in CY 2002, and is expected to further increase in CY 2004, as fish products continue to be associated with a modern healthy diet. However, German per capita consumption is still below the world average of 16.1 kg.

Germany is the biggest net-importer of fish and fishery products in the EU. Total imports of fish and fishery products into Germany in CY 2003 amounted to 785,006 MT (product weight) at a value of U.S. $ 2.73 billion (Euro 2.21 billion).

The U.S. supplied 40,772 MT of fish and fish products in CY 2003 at a value of US$ 113 million (Euro 92 million). On a volume and value basis, this amounts to 5 and 4 percent respectively of the German import market. Frozen Alaska-pollock fillets, frozen Pacific salmon, caviar substitutes, and live lobsters are the most successful U.S. fish products on the German market.

In 2003, the U.S. share of German imports dropped due to the re-entry of China into the market, however U.S. exports to Germany were still higher than in 2001. In the first half year of 2004, German imports from the U.S. rebound at the expense of imports from Russia. They surpassed the previous year’s level by 70 percent in volume and 50 percent in value.

Definitions

Note 1: In this report trade data for groundfish fillets includes:

HS Codes		English Name	Scientific name
fresh or chilled fillets			
0304	1031	Cod	Gadus ssp. + Boreogadus siada
0304	1033	Coalfish	Pollachius virens
0304	1035	Redfish	Sebastes ssp.
0304	1038	Other	
frozen fillets			
0304	2021-2029	Cod	Gadus ssp.
0304	2031	Coalfish	Pollachius virens
0304	2033	Haddock	Melanogrammus aeglefinus
0304	2035-2037	Redfish	Sebastes ssp.
0304	2041	Whiting	Merlangius merlangus
0304	2055-2059	Hake	Merluccius ssp.
0304	2085	Alaska pollack	Theragra chalcogramma
0304	2091	Blue grenadier	Macrutonus novazealandiae
0304	2095	other	

Note 2: In recent years the U.S. dollar/Euro exchange rate has been as follows:

2001:	US$1 = Euro 1.1165
2002:	US$1 = Euro 1.0575
2003:	US$1 = Euro 0.8840

Further exchange rates (as of September 21, 2004, *Handelsblatt*) are for:

U.S. dollar/ Euro	US$1 = Euro 0.8106
Euro/U.S. dollar	Euro 1 = U.S. dollar 1.2336

Abbreviations:

CY	= calendar year
HS	= harmonized system of tariff codes
Kg	= kilogram (1 kg = 2.2 pounds)
MT	= metric ton (1 MT = 1000 kg = 2205 pounds)
NMS	= New Member States (EU)
n.a.	= not available
PSD	= production, supply and demand balance sheet
U.K.	= United Kingdom
U.S.	= United States

Production

The total catch of the German fishing fleet (landings in domestic and foreign ports) amounted to 309,000 MT (catch weight) in CY 2003, this is an increase of 62,000 MT or 25 percent compared to CY 2002. The increase is attributed to an higher catch of mussels and herring. 106,600 MT were landed in domestic ports versus 81,000 MT in 2002.

Only 34.6 MT of salmon was caught in 2003 compared to 41.3 MT in 2002.

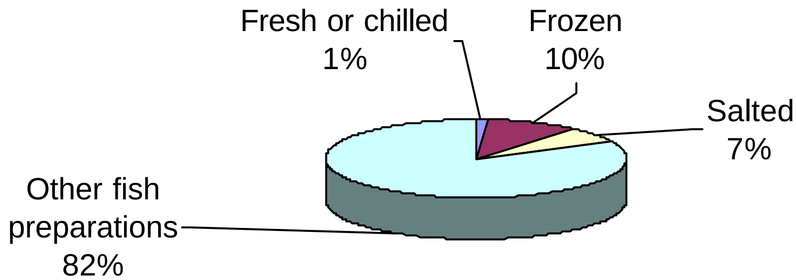
The major fishing regions for the German fleet are the North Sea (about 36 percent), followed by the Northeast Atlantic (34 percent) and the Baltic Sea (18 Percent).

On January 1, 2002 the German ocean fishing fleet consisted of 2,247 ships, 12 deep sea fishing vessels plus 2,269 cutter and coastal fisheries vessels. Total tonnage amounted to 69,227 gross register tons, engine power totaled 163,862 kW. That is a reduction of 35 ships, 2,043 gross register tons and 3,725 kW compared to the previous year. In CY 2003 a total of 9,249 workers were employed by 94 fishing and fish processing companies, 953 workers less than in CY 2001. (Note: Only companies with more than ten employees were counted)

Germany is the fourth largest fish processor in the EU-15, after the U.K., France, and Spain. Production value of fish and fishery products at factory level decreased by 3.1 percent to U.S.$ 1.889 billion (1.531 billion Euro) in CY 2003, while production volume decreased by only 0.3 percent compared to CY 2002 and amounted to 439,637 MT (product weight).

Fish preparations, such as canned fish, baked fillets or fish sticks, make up the majority of production followed by frozen and salted fish. Fresh fish production is already the smallest segment and expected be less and less significant in the future. Production share of the different categories is illustrated in figure 1, details are shown in table 1.

Figure 1: Production share of different product categories in 2003



Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Table 1: German Production of Fish Products (in MT, Euro 1,000, U.S. $ 1,000)

	MT		Euro 1,000		US $ 1,000	
Product	2002	2003	2002	2003	2002	2003
Fresh or chilled	7,737	6,247	47,535	37,672	58,639	46,472
Frozen						
- Filets	3,615	3,599	16,053	15,853	19,803	19,556
- Saltwater fish	261	n.a.	2,629	n.a.	3,243	0
- Fish meat	37,943	34,707	141,369	129,504	174,393	159,756
- Freshwater	1,566	2,361	8,762	11,602	10,809	14,312
Salted						
- Smoked Salmon	14,883	18,628	162,346	186,307	200,270	229,828
- Smoked Herring	936	911	3,504	3,546	4,323	4,374
- Other smoked Fish	9,226	8,593	67,983	69,116	83,864	85,261
Other fish preparations						
- Herring	5,387	14,216	36,101	63,443	44,534	78,263
- Salmon	73,143	78,354	243,946	239,453	300,932	295,389
- Mackerels	712	607	n.a.	n.a.		
- Sardines, sprat	1,704	1,232	8,809	5,716	10,867	7,051
- Other fish	131,541	136,725	343,652	336,741	423,929	415,404
- Baked filets/sticks	46,868	28,887	140,731	86,285	173,606	106,441
- Otherwise prepared	31,160	37,318	112,740	124,555	139,076	153,651
- Fish salad	44,658	37,947	139,993	117,114	172,695	144,472
- Preserved Crayfish	1,730	802	28,795	17,224	35,522	21,248
- Crayfish preparations	278	401	n.a.	5,063	0	6,246
- Caviar substitutes	2,428	3,629	27,098	39,119	33,428	48,257
- Frozen crayfish	3,155	2,704	21,929	18,970	27,052	23,401
Total Production*	441,150	439,637	1,580,601	1,531,401	1,949,829	1,889,136

n.a. = not published because of limited number of companies involved
* = including unpublished values and volumes
exchange rate: 1 Euro = U.S.$ 1.2336
Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Almost the entire German catch of groundfish goes straight into the fresh market. Less than one percent of the market supply of groundfish fillets are produced from fresh fish. Most groundfish fillets produced in Germany are manufactured from imported fillets and further processed into smaller pieces or convenience foods and repackaged. To avoid double counting, "production" in the PSD for groundfish fillets only reflects production from fresh fish.

Consumption

Total human consumption of fishery products added up to 1.194 million MT in CY 2003, up 3 percent compared to the previous year (1.158 million MT). Calculated per capita consumption increased to 14.4 kg in CY 2003, from 14.0 kg in CY 2002, and is expected to further increase in CY 2004, as fish products are associated with a modern healthy diet. However, German per capita consumption is still below the world average of 16.1 kg.

German consumers' favorite fishes are Alaska pollock, herring and tuna followed by Atlantic and Pacific salmon (see table 2).

Table 2: Favorite Fish Varieties in Germany, as a Percentage

	1999	2000	2001	2002	2003
Total Seafood Use	100	100	100	100	100
Thereof Saltwater Fish (incl Herring)	69.3	78.5	75.6	75.1	73.0
Sweet Water Fish	17.2	11.2	15.5	15.8	17.6
Crayfish, Mollusks	13.5	10.3	8.9	8.7	9.4

Type of Fish	1999	2000	2001	2002	2003
Alaska/Pacific Pollack	19.8	27.2	30.1	31.4	29.6
Herring	22.6	20.1	19.2	16.0	18.9
Tuna	13.2	12.6	9.8	12.2	14.0
Salmon	10.4	6.6	7.8	8.1	9.9
Redfish/Perch	6.0	5.0	4.0	5.0	5.5
Coalfish	4.6	4.3	3.9	4.8	4.7
Hake	5.4	4.3	4.4	5.7	4.0
Cod	7.0	3.3	4.2	3.7	3.4
Trout	5.1	2.6	2.6	2.1	1.9
New Zealand Hoki	n.a.	n.a.	1.7	1.5	1.6
Mackerel	2.0	2.2	2.4	2.1	1.3
Plaice	1.6	1.3	1.3	1.1	1.1
Halibut	0.8	0.5	0.6	0.4	0.5
Other	2.3	10.5	8.0	5.9	3.6

Source: Fish Information Center: *Daten und Fakten 2004*

The importance of convenience products is increasing in the fish industry, as in other parts of the food sector. In CY 2003, frozen fish products had the largest market share (32 percent), followed by canned fish preparations (30 percent). Fresh fish remained stable at 10 percent. Crayfish and mollusk accounted for 12 percent, smoked fish for 6 percent, and fish salads for 4 percent (see table 3).

Table 3: Fish Consumption by Product Group, in Percent

	1997	1998	1999	2000	2001	2002	2003
Frozen Fish	21	26	25	25	31	34	32
Preservations and Marinades	31	29	29	30	26	29	30
- Herring	21	18	17	16	15	16	17
- Thuna	7	8	10	11	9	11	12
- Sardines	2	2	1	2	1	2	1
Fresh Fish	14	13	14	14	12	10	10
Crayfish and Mollusks	14	14	15	13	13	12	12
Smoked Fish	5	3	5	7	7	6	6
Fish Salads	4	5	4	4	4	3	4
Other Fish Products	11	10	8	7	7	7	6

Source: Fish Information Center: *Daten und Fakten 2004*

Trade

Total Imports

Germany is the biggest net-importer of fish and fishery products in the EU. Total imports of fish and fishery products into Germany in CY 2003 amounted to 785,006 MT (product weight) at a value of U.S. $ 2.73 billion (Euro 2.21 billion). Of this, roughly 36 percent originated from other EU countries (282,413 MT at U.S.$ 1.03 billion or Euro 836 million). Imports from third countries accounted for about 74 percent of total imports (502,594 MT at U.S.$ 1.7 billion or Euro 1.38 billion). In terms of value, Denmark was the most important EU supplier of fishery products at U.S. $ 395 million (Euro 320 million), Norway was Germany's biggest non-EU supplier at U.S. $ 290 million (Euro 235 million).

German imports from the United States decreased in 2003 by 33 percent after an increase of 88 percent in 2002. In 2002, U.S. exports to Germany had benefited from EU import restriction for animal products originating from China. From February through June 10, 2002, imports from China were prohibited, from June 10 through September 27, 2002 imports of fishery products were allowed but 20 percent of import had to be tested for antibiotics (chloramphenicol). U.S. share of German imports dropped when China came back on the market, however, U.S. exports to Germany were still higher in 2003 than what they had been in 2001. The U.S. supplied 40,772 MT of fish and fish products in CY 2003 at a value of US$ 103 million (Euro 92 million). This amounts to 4.1 percent of the German import market. In CY 2001 only 3.8 percent or 32,154 MT of German imports originated in the U.S.

In the first half year of 2004, U.S. exports rebound and surpassed the previous year's level by 70 percent in volume and by 50 percent in value. The products with the highest relative increase in value were preserved salmon (up 2,487 percent), scallops (up 166 percent), live lobsters (up 104 percent), and shrimps (up 103 percent.) However, these increases occurred from a low absolute level (see table 5a). The highest absolute increase was achieved by Alaska Pollock (up about $ 20 million) followed by caviar substitutes and live lobsters with an increase of about $ 1 million each.

Frozen Alaska-pollock fillets, frozen Pacific salmon, caviar substitutes, and live lobsters are the most successful U.S. fish products on the German market.

Table 5a: German imports of fish and fishery products from the United States by calendar year and product

		2002		2003	
Product	HS Code	MT	1000-$	MT	1000-$
Total frozen Alaska Pollock		**52,555**	**115,166**	**34,016**	**78,526**
Frozen Pacific Pollack fillet	0304 20 850	49,915	111,429	31,461	75,219
Frozen meat of Alaska Pollock	0304 90 610	2,640	3,737	2,555	3,307
Total frozen Pacific salmon		**2,467**	**5,488**	**2,912**	**6,557**
Other frozen Pacific salmon	0303 19 000	2,347	4,892	2,672	5,477
Frozen Pacific salmon fillets	0304 20 130	120	596	240	1,080
Caviar substitutes	**1604 30 900**	**271**	**5,116**	**386**	**5,813**
Live lobsters, not frozen	**0306 22 100**	**168**	**2,264**	**225**	**3,379**
Total frozen hake		**3,878**	**5,818**	**1,441**	**2,316**
Frozen hake fillets	0304 20 560	2	3	154	250
Other frozen hake fillets	0304 20 580	2,528	4,144	1,227	2,012
Frozen meat of hake	0304 90 470	1,348	1,671	60	54
Frozen meat of other saltwater fish	**0304 90 970**	**138**	**1,274**	**266**	**1,175**
Frozen monkfish fillets	**0304 20 830**	**95**	**593**	**146**	**1,050**
Preserved Salmon	**1604 11 000**	**21**	**67**	**95**	**881**
Sockeye salmon (red salmon)	**0303 11 000**	**211**	**673**	**230**	**716**
Total frozen dogfish		**176**	**580**	**137**	**358**
Frozen dogfish 'squalus acant	0303 75 200	143	289	122	281
Frozen dogfish fillets 'squal	0304 20 610	33	291	15	77
Other frozen fish fillets	**0304 20 950**	**36**	**252**	**36**	**282**
Other frozen fish fillets	**1604 19 910**	**12**	**15**	**218**	**256**
Other freshwater fish fillets	**0304 20 190**	**53**	**354**	**39**	**253**
Other mollusks	**0307 91 000**	**1**	**82**	**12**	**232**
Frozen mackarel	**0303 74 300**	**11**	**8**	**249**	**208**
Shrimps in packagings =<2 kg	**1605 20 910**	**17**	**162**	**18**	**174**
Other scallops	**0307 29 900**	**3**	**30**	**13**	**140**
Surimi preparations	**1604 20 050**	**43**	**129**	**42**	**124**
Frozen crabs 'paralith.camcha	**0306 14 100**	**4**	**112**	**4**	**129**
Other		282	1,375	279	1,116
Grand-total		60,442	139,558	40,764	103,685

Table 5b: German imports of fish and fishery products from the United States by year and product (January through June)

		Jan/Jun 2003		Jan/Jun 2004	
Product	HS Code	MT	1000-$	MT	1000-$
Total frozen Alaska pollack		**15,627**	**37,708**	**28,022**	**57,674**
Frozen Pacific Pollack fillet	0304 20 850	14,593	36,279	25,955	55,097
Frozen meat of Alaska Pollack	0304 90 610	1,034	1,429	2,067	2,577
Total frozen Pacific salmon		**1,050**	**2,199**	**1,053**	**2,539**
Other frozen Pacific salmon	0303 19 000	922	1,670	985	2,291
Frozen Pacific salmon fillets	0304 20 130	128	529	68	248
Caviar substitutes	**1604 30 900**	**112**	**1,538**	**188**	**2,632**
Live lobsters, not frozen	**0306 22 100**	**60**	**980**	**131**	**1,996**
Total frozen hake		**506**	**853**	**512**	**859**
Frozen hake fillets	0304 20 560	0	0	19	44
Other frozen hake fillets	0304 20 580	506	853	493	815
Frozen meat of hake	0304 90 470	0	0	0	0
Frozen meat of other saltwater fish	**0304 90 970**	**196**	**796**	**11**	**631**
Frozen monkfish fillets	**0304 20 830**	**72**	**492**	**28**	**617**
Preserved Salmon	**1604 11 000**	**8**	**30**	**72**	**776**
Sockeye salmon (red salmon),	**0303 11 000**	**106**	**314**	**46**	**250**
Total frozen dogfish		**55**	**112**	**33**	**94**
Frozen dogfish 'squalus acant	0303 75 200	55	112	33	94
Frozen dogfish fillets 'squalus ac.	0304 20 610	0	0	0	0
Other frozen fish fillets	**0304 20 950**	**34**	**236**	**0**	**0**
Other frozen fish fillets	**1604 19 910**	**0**	**0**	**178**	**224**
Oth.freshwater fish fillets,	**0304 20 190**	**25**	**168**	**13**	**87**
Other molluscs	**0307 91 000**	**1**	**46**	**4**	**88**
Frozen mackarel	**0303 74 300**	**240**	**199**	**408**	**304**
Shrimps in packagings =<2 kg	**1605 20 910**	**8**	**86**	**19**	**175**
Other scallops	**0307 29 900**	**7**	**76**	**18**	**202**
Surimi preparations	**1604 20 050**	**22**	**67**	**16**	**43**
Frozen crabs 'paralith.camcha	**0306 14 100**	**2**	**45**	**2**	**67**
Other		172	632	235	721
Grand-total		18,303	46,577	30,989	69,979

Source: FAS/Berlin based on German Federal Office of Statistics, Wiesbaden

Salmon Imports

Traditionally, Norway is by far the main supplier of salmon to the German market followed by Denmark, the U.K. and the United States with market shares of 59, 18, 9 and 6 percent, respectively (based on live weight for whole or eviscerated salmon in CY 2003). Imports from the United States amounted to 3,369 MT, up 13.5 percent from the previous year (2,963 MT).

Groundfish Fillets Imports

Total imports of groundfish fillets decreased by 6 percent in 2003, compared to the previous year and amounted to 782,307 MT. China was the number one supplier to the German market with a market share of 31 percent followed by Russia (17 percent) and the U.S. (15 percent.)

Alaska pollock is the single most important groundfish species that the U.S. exports to Germany and the one with the highest potential of further increasing exports.
In 2002, for the first time, the U.S. had managed to become the most important supplier of groundfish fillets (mainly Alaska-pollock) to the German market and break the traditional predominance of Russia and China in this market. The U.S. market share exploded from 0.6 percent in 2000 to 11 percent in 2001 and 23 percent in 2002. This big increase in 2002 was largely a result of import restrictions for animal products originating in China (see section on total imports). These restriction were lifted later in 2002, which resulted in a resumption of imports from China. In 2003, China reclaimed its position as number one supplier to the German market followed by Russia and the U.S.

In the first half of 2004, the U.S. was able to increase its Alaska pollock exports to Germany by 78 percent compared to the same period in 2003. The U.S. market share rose to 36 percent, while China remained stable at 44 and the Russian market share dropped to 17 percent. German industry sources name problems with the quota management and overfishing as reason for the decline in Russian exports to Germany. The Marine Stewardship Council (MSC) an international nonprofit organization that promotes sustainable fisheries is expected to officially complete the certification of Alaska pollock in the coming months[1]. This will further enhance U.S. exports to Germany.

Exports

German exports of fish and fish products in CY 2003 decreased in volume by 4.3 percent and in value by 7.6 percent compared to the previous year. Exports reached 307,244 MT, valued at U.S.$ 1.12 billion (Euro 909 million), including U.S.$ 976 million (Euro 791 million) to other EU countries and U.S. $ 145 million (Euro 118 million) to third countries. Major export destinations within the EU-15 were France, the Netherlands, the U.K., Italy, and Austria. Poland, Switzerland, Nigeria, the Czech Republic and Lithuania were major non-EU destinations. Exports to the United States are marginal. In CY 2003 they reached 812 MT, with a value of U.S. $ 3.681 million and consisted mainly of herrings.

[1] According to MSC London the certification has been concluded but not officially announced for the Eastern Beringsea/Aleutian Island fishery. For the Gulf of Alaska fishery the certification process is still ongoing.

Marketing
Direct sales promotions and other marketing campaigns aimed at increasing sales are entirely the responsibility of individual companies.

Generic fish promotions are carried out by the Fish Information Center (Fisch-Informationszentrum, FIZ, www.fischinfo.de) in Hamburg. It was founded in 1997 and is part of the Federal Association of the German Fish Industry and the Fish Wholesalers (Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.). It is open to private industry and associations and is funded through membership contributions.

The FIZ does not take part in or fund sales promotion events, instead it focuses on public relations campaigns and on initiatives to create a positive image for fish and fish products and fishing practices in Germany. FIZ addresses questions like quality and health aspects, animal welfare and fish harvesting practices, resource protection, and the impact of fishing on the environment and on third world countries.

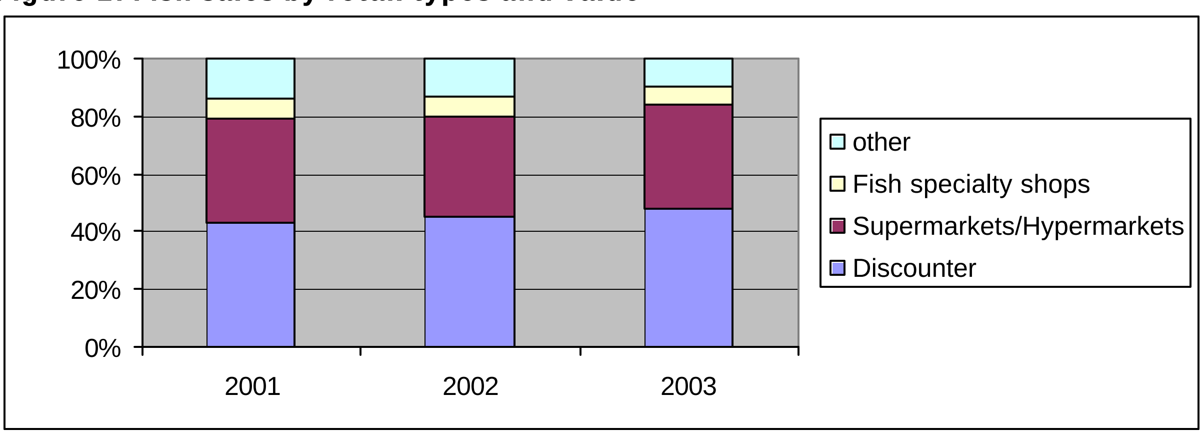
The FIZ is interested in joint promotion projects with foreign institutions. For instance FIZ would be willing to conduct a joint promotion in Germany for Alaska Pollock with U.S. fishery products organizations.

Trends in fish sales by retail type

On a volume basis, 84 percent of fishery products were purchased at retail chains (including super/hypermarkets and discount stores) in 2003, compared to 81 percent in 2002. Fish specialty stores accounted for 6 percent of the sales volume and other outlets such as farmers markets for 10 percent. The market share of discount stores (by volume) increased from 45 percent in 2002 to 48 percent in 2003. The trend towards shopping in discount stores will likely remain unchanged in the future as the tight economic situation and cuts in the German social security system lead to continued dampening of consumer spending.

Discount markets are stores with a limited number of products, usually one per category and less than 1,000 in total. They compete on price and do not offer much customer service. The most successful discount chains in Germany are Aldi and Lidl. These stores are very popular as Germany is a very price sensitive market.

Figure 2: Fish sales by retail types and value



Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Fish and frozen food

The consumption of frozen food has increased dramatically over the past ten years in Germany. From 1993 to 2003 the per capita consumption of frozen food excluding ice cream increased from 23.3 kg to 34.6 kg. Fish is one of the segments that benefited from this trend. In the retail sector fish sales increased from 96,120 MT in 1993, to 155,747 MT in 2003. This translates into market shares of fish in the frozen food retail sector of 9.5 percent in 1993, and 10.6 percent in 2003.

Consumption in the food service sector (hotel, restaurants, institutions (HRI)) of frozen fish has also increased in recent years, but on a smaller scale than retail consumption. HRI consumption increased from 61,500 MT in 1993 to 84,897 MT in 2003. The market share, however, dropped from 7.0 percent in 1993 to 6.1 percent in 2003, as other frozen food segments, such as bakery goods expanded even more than fish.

Seafood in the HRI sector

The German HRI magazine "*gv-praxis*" annually asks more than 150 HRI companies about consumption trends in their company and the importance of different kinds of food for their business. The last survey was carried out in April/May of 2004, and showed that the importance of seafood varies depending on the category of the companies. Out of 40 foods seafood ranked number 15 in institutional establishments, number 9 in hotels, and number 4 in restaurants.

Seafood Trade Shows

The *European Seafood Exposition* (ESE) in Brussels is the most important trade show for the German fish market. ESE is an annual event and the next show will be held from April 26-28, 2005. In 2004, 1,268 exhibitors from 115 countries attracted 27,818 trade visitors. For more information about the show and how to participate please visit: http://www.euroseafood.com

Fish International is the leading international seafood show held in Germany, and includes the following four areas: trading, technology, logistics and point of sale. It is held bi-annually in Bremen. The next show is scheduled from February 9 –12, 2006. For more information about the show and how to participate please visit: http://www.fishinternational.com/

Section II: Statistical Tables

Table 6: PSD and Import Price Table for Salmon, Whole/Eviscerated (in MT, U.S. $)

PSD Table

Country Germany

Commodity Salmon, Whole/Eviscerated (MT)

	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [	Estimate [	DA Official [	Estimate [	DA Official [	Estimate [
Market Year Begin		01/2003		01/2004		01/2005
Beginning Stocks	0	0	0	0	0	0
Total Production	29	41	30	35	0	30
Intra-EC Imports	19000	19801	19500	30000	0	30000
Other Imports	43000	40759	43600	40000	0	40000
TOTAL Imports	62000	60560	63100	70000	0	70000
TOTAL SUPPLY	62029	60601	63130	70035	0	70030
Intra-EC Exports	20000	18646	20000	26000	0	25000
Other Exports	120	186	130	150	0	150
TOTAL Exports	20120	18832	20130	26150	0	25150
Domestic Consumption	41909	41769	43000	43885	0	44880
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	41909	41769	43000	43885	0	44880
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	62029	60601	63130	70035	0	70030

Note: Intra-EU = EU-15 in 2003 and EU-25 in 2004 and 2005

Source: FAS/Berlin based on data from German Ministry of Consumer Protection, Food, and Agriculture (BMVEL), Annual Report on German Fisheries 2003; Federal Association of the German Fish Industry and Fish Wholesale; German Federal Office of Statistics, Wiesbaden.

Prices Table

Country Germany

Commodity Salmon, Whole/Eviscerated

Prices in $ per uom MT

Year	2002	2003	% Change	2004	% Change
Jan	2988.50	3732.62	25%	3690.85	-1
Feb	2741.08	3523.78	29%	3682.39	5
Mar	2941.90	3629.17	23%	3686.23	2
Apr	3022.10	3338.21	10%	3733.83	12
May	3048.40	3777.38	24%	3780.21	0
Jun	3268.11	3334.69	2%	3609.65	8
Jul	3430.68	3179.14	-7%		
Aug	3326.50	2794.42	-16%		
Sep	3153.06	2861.60	-9%		
Oct	3333.62	3504.94	5%		
Nov	3355.09	3246.64	-3%		
Dec	3556.78	3516.07	-1%		

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 7: German Imports of Salmon Whole/Eviscerated (in MT)

Import Trade Matrix

Country Germany

Commodit Salmon, Whole/Eviscerated

Time Period	Jan/Dec	Units:	MT
Imports for:	2002		**2003**
U.S.	2,966	U.S.	3,369
Others		Others	
NORWAY	46,725	NORWAY	35,664
DENMARK	7,401	DENMARK	10,629
UNITED KINGD	4,006	UNITED KINGI	5,377
IRELAND	1,990	IRELAND	1,613
CANADA	542	SWEDEN	1,574
SWEDEN	473	CANADA	663
NETHERLAND	385	PR CHINA	606
FRANCE	199	NETHERLAND	356
BELGIUM	120	ICELAND	311
COLOMBIA	116	FRANCE	121
Total for Others	61,957		56,914
Others not Liste	766		278
Grand Total	65,689		60,561
EU-15	14,625		19,801
NMS	90		26
Extra-EU-25	50,974		40,733

NMS = New Member States
Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 8: German Exports of Salmon Whole/Eviscerated (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Salmon, Whole/Eviscerated		
Time Period	Jan/Dec	Units:	MT
Exports for:	2002		**2003**
U.S.	0	U.S.	1
Others		Others	
FRANCE	13,491	FRANCE	7,921
NETHERLANDS	4,336	NETHERLANDS	3,854
ITALY	2,326	SPAIN	3,088
SPAIN	2,066	ITALY	1,847
UNITED KINGDOM	1,619	BELGIUM	644
BELGIUM	791	DENMARK	461
AUSTRIA	516	AUSTRIA	330
DENMARK	483	UNITED KINGDOM	296
PORTUGAL	132	PORTUGAL	188
POLAND	114	SERBIA/MONTENEGRO	51
Total for Others	25,874		18,680
Others not Listed	183		151
Grand Total	26,057		18,832
EU-15	25,776		18,646
NMS	128		50
Extra-EU-25	147		136

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 9: PSD and Import Price Table for Groundfish Fillets (in MT, $)

PSD Table

Country Germany

Commodity Groundfish, Fillets (MT)

	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [	Estimate [I	DA Official [	Estimate [I	DA Official [	Estimate [I
Market Year Begin		01/2003		01/2004		01/2005
Beginning Stocks	0	0	0	0	0	0
Total Production	6500	6500	6500	6500	0	6500
Intra-EC Imports	71100	65101	71200	100000	0	95000
Other Imports	772000	717134	772000	640000	0	620000
TOTAL Imports	843100	782235	843200	740000	0	715000
TOTAL SUPPLY	849600	788735	849700	746500	0	721500
Intra-EC Exports	167000	161314	167000	160000	0	158000
Other Exports	6300	6729	6300	3000	0	2900
TOTAL Exports	173300	168043	173300	163000	0	160900
Domestic Consumption	676300	620692	676400	583500	0	560600
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	676300	620692	676400	583500	0	560600
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	849600	788735	849700	746500	0	721500

Note: Intra-EU = EU-15 in 2003 and EU-25 in 2004 and 2005

Source: FAS/Berlin based on data from German Ministry of Consumer Protection, Food, and Agriculture (BMVEL); Federal Association of the German Fish Industry and Fish Wholesale; German Federal Office of Statistics, Wiesbaden.

Prices Table

Country Germany

Commodity Groundfish, Fillets

Prices in $ per uom MT

Year	2002	2003	% Change	2004	% Change
Jan	2422.85	2842.26	17%	2885.43	2
Feb	2383.50	2940.09	23%	2800.75	-5
Mar	2682.01	2928.54	9%	2764.25	-6
Apr	2406.86	3030.02	26%	2833.11	-6
May	2573.40	2995.91	16%	2530.45	-16
Jun	2734.22	2774.77	1%	2633.21	-5
Jul	2886.16	2679.14	-7%		
Aug	2742.09	2842.32	4%		
Sep	2705.59	2700.54	0%		
Oct	2762.56	2870.08	4%		
Nov	2747.60	2805.02	2%		
Dec	2903.84	2975.39	2%		

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 10: German Imports of Groundfish Fillets (in MT)

Import Trade Matrix

Country	Germany		
Commodity	Groundfish, Fillets		
Time Period	Jan/Dec	Units:	MT
Imports for:	2002		**2003**
U.S.	190,064	U.S.	119,194
Others		Others	
RUSSIA	176,936	PR CHINA	242,399
PR CHINA	163,317	RUSSIA	133,605
ICELAND	42,106	ICELAND	44,723
DENMARK	39,143	DENMARK	36,249
NEW ZEALAND	32,988	POLAND	29,173
CHILE	30,909	NEW ZEALAND	29,085
POLAND	27,728	CHILE	27,533
NORWAY	24,102	NORWAY	26,801
PERU	20,382	ARGENTINA	20,256
ARGENTINA	19,644	NETHERLANDS	12,299
Total for Others	577,255		602,123
Others not Listed	63,103		60,990
Grand Total	830,422		782,307
EU-15	71,317		65,101
NMS	33,846		39,080
Extra-EU-25	725,188		678,054

Source: FAS Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 11: German Exports of Groundfish Fillets (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Groundfish, Fillets		
Time Period	Jan/Dec	Units:	MT
Exports for:	2002		**2003**
U.S.	17	U.S.	69
Others		Others	
UNITED KINGDOM	51,478	FRANCE	48,713
FRANCE	38,774	UNITED KINGDOM	38,518
NETHERLANDS	20,885	NETHERLANDS	18,744
DENMARK	15,372	BELGIUM	14,420
BELGIUM	13,173	AUSTRIA	11,523
AUSTRIA	11,381	ITALY	8,780
ITALY	6,471	DENMARK	5,889
SPAIN	5,509	SWEDEN	5,659
SWEDEN	5,315	SPAIN	4,433
POLAND	1,384	GREECE	1,651
Total for Others	169742		158330
Others not Listed	7728		9677
Grand Total	177487		168076
EU-15	171,530		161,314
NMS	3,254		3,728
Extra-EU-25	2,641		3,001

Source: FAS Berlin based on data from German Federal Office of Statistics, Wiesbaden